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ABSTRACT

Best practices in trade union-sponsored adult guidance programs were identified through five case studies in the United Kingdom and one in Denmark. The case studies from the United Kingdom focused on the following: a partnership between local trade unions and a city center education guidance service supported by a local college of further and higher education, city council, and local training and enterprise council; a national initiative aimed at employees who would otherwise be unlikely to receive training at work, left school at the earliest opportunity, and have few prospects for advancement; a partnership between a university and a local training partnership to provide careers guidance to union members faced with layoffs; a union-management partnership to promote employee "ownership" of learning and ensure that employees develop the skills needed to obtain employment in the event of layoffs; and a trade union-management partnership to help workers achieve National Targets for Education and Training and increase industry understanding and use of National Vocational Qualifications. The Danish case study chronicled union participation in determining the content and methodology of a state-funded training scheme allowing employees with few qualifications to have access to individually tailored adult education and vocational training programs lasting 4-36 weeks. (MN)

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TRADE UNIONS AND ADULT GUIDANCE

CASE STUDIES OF BEST PRACTICE

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Case Study 1

Future Prospects (York) and local branches of Trade Unions: local collaboration and networking

Description of the initiative

1 When the privately owned company ABB took over BREL (the York railway works) in the late 1980s, the four Unions involved - TGWU, RMT, AEEU, and EEPTU - worked closely and supportively with management on the introduction of policies for change, including the implementation of wide-ranging training programmes. This included the negotiation of a flexibility agreement to enable employees to work flexibly across craft areas previously subject to demarcation, eg electricians and fitters. The main motivating factor for both Management and Unions was the strategic importance of training and equipping staff to perform effectively in the increasingly competitive national and international transport engineering markets.

2 This already-established pattern of close collaboration enabled management and Unions to continue to co-operate as smaller-scale redundancies resulting from internal rationalisation were succeeded by large-scale redundancies caused by external market forces. The efforts of the internal Management-Union committee established to cope with the redundancies was matched and supported by a local externally-sited York support group comprising York City Council, Future Prospects, North Yorkshire TEC, the Employment Service and the Benefit Agency.

3 Future Prospects, York, is a City-centre educational guidance service supported by York College of Further and Higher Education (YCFHE), York City Council and North Yorkshire TEC. Future Prospects provides an umbrella for a wide range of initiatives and services, including an extensive programme of community-based adult education courses delivered on its own premises and especially responsive to local requirements. Future Prospects makes extensive use of the feedback function of guidance to plan its own provision, and to communicate local needs to its principal partners including YCFHE.

4 York is an economic and social community notable for its tight local networks and the strength of the inter-personal relationships which enable those networks to operate effectively. The local Union branches, with internal communications cemented by the local Trades Council, are prominent in their involvement in the local networks. This enables Union representatives and officers to use their already close working relationships with other agencies in the community, as and when these are needed to assist and support their members.

5 The relationship formed between the ABB Unions and Future Prospects resulted from the individual initiative of two Union Convenors (TGWU and

RMT) and the Manager of Future Prospects. Both Convenors had worked closely with ABB management in implementing the staff training policy, and understood the importance of training members to cope effectively with change and the fundamental importance of cultivating positive attitudes towards lifelong learning. They also understood the personal barriers and often ingrained attitudes impeding many individual members from adjusting easily to the changing environment. These barriers and attitudes were shaped by circumstances which included:

- the families of many members had been employed at the railway works for several generations;
- family and individual security had not previously depended on renewable cycles of education and training;
- many workers had left school at the first opportunity.

6 The Convenors appreciated that many members required one-to-one counselling and continuing personal support to understand the importance of lifelong learning and to adjust to the changing market environment, including that presented by imminent redundancy. The RMT Convenor was also a Union tutor in industrial relations and trained in basic counselling skills (at Future Prospects).

7 Through the strength of the local networks formed by the TU Convenors:

- Future Prospects was invited to provide guidance services within ABB;
- the RMT and TGWU Convenors were invited to join the York Support Group and to work in partnership with the City Council, TEC, Future Prospects, College and other partner agencies in extending guidance services and learning opportunities to ABB staff.

The day-to-day work of the Convenors meant that they themselves were increasingly involved in providing 'intermediary' guidance services to members, including identification of needs, referral, and longer-term individual and family support.

8 As a direct consequence of the TUs' involvement in guidance work the RMT Convenor moved to Future Prospects, and through the initiative of the York Support Group was subsequently employed as the Welfare Support Worker with specific responsibility for ABB. This enabled the Convenor to work on a team basis with a College Lecturer specifically seconded to Future Prospects to:

- provide information and advice to ABB on work and learning opportunities;
- identify individual and group learning requirements for feedback to College, TEC and other providers.

Courses laid on specifically for ABB included: RSA Computer Literacy and Information Technology (CLAIT); an APL programme to enable unqualified but experienced welders to become NVQ-accredited; and a '16th edition' programme to up-skill electricians. Many employees have progressed to individual learning opportunities, either on in-fill or through appropriate tailoring.

9 A key feature in explaining the success of the initiative has been the recognition by all concerned of the importance of taking full account of the human dimension, including the personal trauma which - unless worked through - represents a continuing barrier to progression. Many of the workers have spent their working lives to date at ABB. Main counselling requirements include:

- helping people through the inevitable periods of loss of confidence and self-esteem;
- supporting them and their families in overcoming isolation and working through the grieving process;
- providing advice and guidance to assist them in identifying suitable education, training and work opportunities, and understanding the fundamental importance of lifelong learning in a period of accelerating change;
- supporting them in making applications and where necessary negotiating opportunities to ensure they meet personal needs;
- helping them to relate their learning to the needs of the local labour market, and to identify possible career opportunities.

10 As well as visiting homes, befriending, and having open sessions on Future Prospects premises, the TU-college team has operated from a local Working Men's Club and other informal situations including one-to-one meetings in local pubs and the street. The encouragement of peer group support is also seen as all-important.

11 Success rates are high. The TU-Future Prospects initiative demonstrates the central role which TU representatives are able to play in initiating guidance and learning provision, and in providing direct services including:

- individual and group mentoring;
- identification of individual and group need;
- referral facilities;
- advocacy;
- feedback on identified needs to the policy makers and providers.

Although these developments have gained additional impetus through large-scale redundancy, the basic frameworks and networks were already in place. Key factors have included:

- the close collaboration which already existed between Unions and Management on issues including training and lifelong learning;
- the extent of the TU Convenors' activity throughout their local community, and the strength of the networks they are therefore able to utilise on behalf of their members.

12 The initiative has since been extended to provide guidance to other companies experiencing redundancies. The TU Convenor (now fully employed by Future Prospects) works closely with the relevant Branch Union representatives in providing guidance services, and reports regularly on activities to the York Trades Council. A main feature throughout is the close teamwork created with the seconded College Lecturer, and the scope this provides to:

- encourage and support members (many of whom left school at the first opportunity) to seriously consider lifelong learning and to take full advantage of the opportunities available;
- identify and create learning opportunities for members, both individually and in groups;
- help members to relate lifelong learning to actual job opportunities (including areas not previously considered), individual progression and personal growth.

Key learning points

- *Close management-TU relationships can be significant in taking forward guidance and lifelong learning, and gradually developing local learning cultures.*

- *Guidance for redundancy is an inseparable function of guidance for change in a flexible labour market. The processes are indivisible.*

- *The 'shock' effect of redundancy can provide a stimulus to ensure that guidance and lifelong learning become continuing features of the local culture.*

- *Many TU representatives already act as 'intermediate' providers of guidance in their day-to-day work, but the importance of this role may be under-estimated and often unrealised. Once the function is identified many TU representatives may find they have acquired a key skill area which can then be further developed for the short- and longer-term benefit of their members (including formal training in guidance and counselling skills).*

- *Guidance to prepare individuals for change needs to take full account of individual history, circumstances, attitudes, and environment.*

- *Many TU representatives are uniquely positioned to provide intermediary guidance services for their members because of their closeness to members, their knowledge of individual needs including family requirements and circumstances, and the strength of the local networks on which they are able to draw.*

- *TU representatives need to be ready to initiate action and negotiate guidance and learning provision on behalf of their members.*

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Case Study 2

UNISON Return to Learn Programme, in partnership with WEA

History

1 The UNISON Return to Learn Programme (R2L), organised in partnership with the WEA, is a highly significant and pioneering national initiative aimed directly at those employees who are otherwise unlikely to be offered training at work, left school at the earliest opportunity, and generally have few if any prospects for advancement.

2 Since R2L was first piloted in WEA West Mercia District in 1989, over 5,000 UNISON members have completed the course. The students are mainly employed in the NHS, local authorities, further and higher education institutions, and other public-sector services. An evaluation carried out in 1995 (*Return to Learn: UNISON's Fresh Approach to Trade Union Education:* Helen Kennedy) shows that 80% of students were female, 42% employed part-time, 60% unqualified, 23% from ethnic minorities, 50% aged 45+, and 1.7% with disabilities. Since 1995 additional efforts have been made to increase the number of workers from ethnic minorities and with disabilities who enrol in the programme.

3 Since 1996 WEA has also mounted courses funded directly by employers. The success of R2L gained national recognition in 1997 when the employer-sponsored programme organised for staff of the Lambeth NHS Health Care Trust, supported by a strong employer-union partnership, won the NIACE Learning in the Workplace Award sponsored by Ford EDAP.

4 The origins of R2L lie in the broad tradition of labour education, and in particular:

- the experience developed by WEA in running the long-standing *Second Chance to Learn* programmes;
- union sponsorship of liberal education programmes and residential colleges;
- NUPE's *Workbase* initiative to encourage employers to recognise the importance of addressing the basic educational requirements shared by many employees.

5 When COHSE, NALGO and NUPE were merged in 1993 to form UNISON, R2L was integrated into UNISON's Open College, thus bringing together a range of educational programmes for UNISON members. R2L has gained additional impetus from the increasing pressures within the NHS for all care workers to become qualified.

Structure and purpose

6 Each R2L is organised to run for 10 months. Key features include:

- the use of open learning methodology - all students are provided with two well-produced workbooks so that students can work at their own pace;

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- allocation of a personal tutor to each student;
- study groups of some 10 students which meet every two to three weeks;
- the opportunity to attend four day schools or two residential weekends, where students develop their study skills and are provided with assistance to follow up their own particular interests and priorities;
- the option of having course work accredited - students can gain up to six educational credits awarded through the Open College Network.

7 The R2L course is designed to develop student skills and confidence in four main areas:

- *Writing*
  Students are given the opportunity to develop writing skills through taking and writing up notes; report-writing and reviews; and creative writing. The mechanics of writing - punctuation, spelling and grammar - are also covered.
- *Investigating*
  Students undertake research assignments to help them learn how to find, select and use information, undertake surveys and observe intelligently, and present the information clearly.
- *Analysing*
  Students learn to sort out fact from opinion, put forward their own opinions supported by relevant facts, study source material, and explore the influence of the media.
- *Working with figures*
  Students are helped to understand main methods of calculation such as percentages, and to present figures by using charts. They are also able to pursue arithmetical interests in greater depth, including learning how to analyse and interpret statistics.

Guidance

8 Particular attractions to students of the UNISON-sponsored R2L provision includes the fact that the courses:

- are offered through the Union, which is seen as an organisation sympathetic to, and supportive of, members' needs;
- are offered to members via UNISON at no cost (also the case where the employer directly funds the courses)

9 For many of the students, the decision to re-enter education has not been an easy one, and the supportive relationship developed by tutors is often central to student success. Key areas where the tutor's guidance skills can prove fundamental include:

- *Explaining the course* to potential students, which can prove difficult because R2L is not clearly a "subject"
- *Developing and supporting student confidence*. Key stages include:
  - the initial period when students are uncertain of their own ability to cope;

- periods of the course which present many students with particular difficulty such as choosing and carrying out a research assignment on a community issue, and conducting informed interviews.

- *Providing constructive feedback*, and balancing praise and criticism in ways which do not destroy confidence. One very important aspect of the course is that students' work is not "marked" Students themselves are encouraged to comment on the tutor's feedback, and many comment on how much they appreciate the help they receive and the respect shown towards their work.
- *Helping students to overcome anxiety*, including anxiety about attendance at the first residential weekend. Many students have not been away on their own, if at all, for many years. The weekends help students to deal with new situations and build mutual support.
- *Providing advice* both within and outside the study groups. WEA encourages tutors to create a supportive atmosphere during the fortnightly sessions, so that students can learn how to develop peer group support.
- *Helping students to overcome barriers to learning*. Many students have to overcome personal difficulties including - especially for female students - those arising from domestic circumstances and responsibilities, and family attitudes towards learning.
- *Helping students to identify individually suitable educational progression routes*. The 1995 evaluation (Kennedy: *Return to Learn*) shows 59% of respondents progressing into extended educational routes including vocation-related courses, further and higher education, the UNISON Open College, other WEA courses, and TU-oriented education. However, the evaluation also found a number of students encountering obstacles to progression including lack of information, apparent absence of appropriate provision, concern about less supportive teaching practices in further/higher education, and concern about the effects on own domestic and financial situation. The cost of further learning for low-paid workers is inevitably proving the most pressing issue. Although R2L is supported by UNISON and/or employers, the same is less likely to apply to progression routes.

- *Helping students to progress at work, and to cope successfully in their changing relationships with employers* caused by new-found abilities and motivation. The 1995 evaluation shows 29% of respondents taking on further roles at work including those resulting from promotion, job changes, additional responsibilities, and take-up of work-based training including NVQs. Two-thirds of respondents felt the course could assist progression at work and identified ways in which this could take place. However a significant number felt they had no prospects of advancement, and cited barriers including age, occupation, employer membership, and the attitudes of employers.

10 WEA and UNISON have taken the provision of high-quality guidance seriously, and have also addressed the points raised in the 1995 evaluation. Main actions include:

- producing a manual for WEA tutorial staff which includes procedures on guidance responsibilities;
- preparing a student entitlement statement (*see Appendix 1*),

- utilising the services of guidance consultants (Lesley Haughton and Carole Barnes) to advise on all aspects of guidance policy including internal staff training provision, and to work with WEA District Secretaries in drawing up branch plans for guidance delivery;
- drafting quality assurance procedures for R2L which include quality standards for guidance provision (*note: still at the consultative stage*);
- including clear statements of the guidance responsibilities of WEA tutors in R2L-tutor job descriptions;
- inviting guidance specialists to contribute to residential weekends in some courses, and providing opportunities for students to meet individual guidance needs during their assignments (eg through investigating opportunities of personal interest);
- working to ensure all WEA tutors have access to up-to-date information on local learning opportunities and helping agencies within local networks;
- trying to ensure the quality of initial guidance always meets FEFC requirements (*note: although this is possible where the initial guidance is conducted by WEA tutors, it is much more difficult to assure where employers have first contact with potential students. WEA's objective is that all initial guidance should be conducted by WEA tutors so that evidence of the required quality can be made readily available to FEFC*);
- making attractively-designed information leaflets widely available to prospective students, which provide clear explanations of the basic framework and objectives of R2L in simple format (UNISON);
- reinforcing the leaflets with well-written short case-studies of ex-students who have successfully completed R2L. These role-models are also published in Student Magazines designed for Regions of UNISON or for specific employers (eg NHS Health Trust)

11 UNISON has developed an innovative and visionary system of front-line information, advice and guidance which involves the training of ex-students - Voluntary Educational Advisers (VEAs) - to offer help to prospective and current students. The VEA scheme operates in areas where R2L has been running for several years. VEAs undertake a range of activities which include

- helping with recruitment (eg by talking to students about their own experience as learners),
- welcoming new students at enrolment sessions,
- speaking at UNISON meetings about R2L,
- producing publicity materials;
- working as tutor assistants,
- providing additional individual mentoring and support where required for individual students,
- acting as valuable role models for new students;
- advocating the benefits of UNISON membership and R2L within their Union and workplace

Other related WEA and UNISON learning provision

12 In addition to R2L UNISON is responsible for pioneering, or helping to pioneer in partnership with employers, a number of other important learning opportunities, including:

- *the WEA Communication skills programme*. The four modules are designed to help students to:
  - write better letters and reports;
  - improve study skills, and make the most of training courses;
  - pass on information (through writing instructions and memos);
  - understand forms (eg information required, forms at work).

  The format and delivery framework are similar to R2L. A main objective is to prepare members for progression to NVQs. Open College credits are also available.
- The *Women, Work and Society* programme, aimed at women who have been out of education for a while, have few if any qualifications, and lack confidence in their ability to learn. Again, the format and delivery framework is similar to R2L.
- UNISON's new Health Care Diploma and Degree course at Sheffield Hallam University, which uses APEL to accredit existing skills for credits of up to the equivalent of the first year of a University course.

The success of the UNISON Open College

13 Employees throughout the public sector (NHS, local authority, Universities etc) are among the main beneficiaries of the R2L courses, and other courses organised by the UNISON Open College. Recently published figures show that more than 1,500 members a year enrol for UNISON Open College courses, and many of these are ancillary or equivalent staff. UNISON'S programmes are widely commended within the wider trade union movement and adult education.

UNISON/Employer Partnerships *(also see Appendix 2)*

14 Since 1995, UNISON has been increasingly successful in extending R2L and the Communication Skills programme to members by negotiating UNISON/employer partnerships. These have:

- expanded the number of members taking up learning opportunities;
- enhanced UNISON's image as a progressive and innovative trade union;
- increased the opportunities to open up union-led EDPs throughout the public service sector.

A significant number of TECs have also been involved in these arrangements.

15 Partnerships are negotiated on the basis that the employer:

- pays all costs;
- provides time-off with pay for members to attend the study group element of the courses (four days for 'Communication Skills' and ten days for 'R2L');
- provides a range of support for participant employees, eg computer facilities.

16 The evidence compiled by UNISON also shows that employers view the partnership initiatives as long-term commitments which can be extended into publicly-funded EDPs. Advantages which are already apparent for all parties include the following:

- R2L can provide the foundation for specific occupational groups seeking progression opportunities and up-skilling. Currently discussions are taking place to consider the role of R2L in enhancing the prospects and skills of health care assistants, learning support assistants and home carers.
- R2L is proving invaluable in preparing many health care assistants for NVQs and further study leading to professional qualifications in health, such as nurse registration training.
- R2L can have a considerable impact on staff morale and consequent 'productivity';
- R2L can help in overcoming staff shortages caused by lack of sufficiently skilled and qualified staff (eg qualified and experienced nursing staff).

17 UNISON, through its Open College Unit and Health Group, is actively exploring the design of R2L programmes specific to health care assistants, possibly also offering opportunities for NVQ accreditation. UNISON is interested in involving TECs in the implementation and funding of the R2L health care assistant programme in partnership with public sector employers, possibly with initial pilots in those areas where strong UNISON-Health Trust partnerships on R2L already exist. (*Note: to date UNISON reports that no initiatives have been negotiated in the private and voluntary sectors. Although UNISON has members in the private sector, UNISON reports that there can be difficulties in gaining agreement with a number of employers and that some do not recognise the Union.*)

Key learning points

- *Where TU responsibility for members' welfare is extended as a deliberate act of policy to embrace responsibility for learning and progression, the scope for TUs to influence the quality of learning and guidance provision is considerable.*

- *Belief in the power of learning and guidance needs to start at the top. There also need to be champions at key points throughout the union structure.*

- *TUs can play a particularly important role in helping members with few if any qualifications, part-time workers, women, ethnic minorities, and members with disabilities. It is also significant that approximately half of R2L learners are 45+.*

- *Close management-TU partnerships need to be negotiated to take forward guidance and lifelong learning, and gradually develop local learning cultures including the creation of EDPs. Employers and TUs need to exercise joint*

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responsibility for equipping staff for change and progression, and the enhancement of individual qualifications.

- *Deliberate policies need to be developed for guidance delivery, to include union representatives and also other key participants including the learning providers. The WEA emphasis on designing and implementing quality systems for guidance is one of the particularly impressive features of this case study.*

- *There is a high demand from TU members and other employees for high quality guidance to provide help in areas including individual progression, and WEA and UNISON are responding positively.*

- *Members identify the cost of lifelong learning as a key barrier impeding progression. This fact underlines the importance of guidance which includes advice on finance.*

- *The UNISON-WEA initiative demonstrates the value of involving grass-roots membership in guidance provision to their peer group, and in providing them with training and experience in the requisite skills (as in the UNISON Voluntary Educational Adviser initiative).*

- *The Case Study reinforces the central importance of ensuring members have access to high quality information and advice.*

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APPENDIX 1

WEA NATIONAL EDUCATIONAL GUIDANCE PROJECT 1996-97

Student entitlement statement: March 1997

EDUCATIONAL GUIDANCE AND INFORMATION FOR WEA STUDENTS

The WEA has a variety of students with many different requirements. As an Association, we aim to offer the following, although certain aspects may not be applicable to you:

1. Before you start your course, or at the first session

(a) information about the course, about the WEA and other courses it can offer you

(b) help to decide if it is the right course for you, or if you will need any educational or practical support from the WEA or another source in order to complete the course

(c) referral to other providers of learning opportunities if appropriate, or of impartial guidance and information if required

2. Why you are on the course

(a) detailed information about the course, and about what is expected of you

(b) help with planning your learning

(c) constructive comments and an opportunity to discuss your learning

3. Before you finish you course, or if you do not complete it

(a) information about what you have achieved

(b) information about what you might do next, with the WEA or in other contexts

(c) help to decide what next steps would be right for you

(d) referral to other providers of learning opportunities, or of impartial guidance and information if required

Who to ask

Different people in the WEA will be able to help at different stages: the District Office, your local WEA Organiser, Branch Secretary, or Course Tutor.

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APPENDIX 2

UNISON'S EMPLOYER-UNION PARTNERSHIP APPROACH TO EMPLOYEE DEVELOPMENT

THE EXTENT OF PARTNERSHIP IN HEALTH

Mid-Anglia Community Health NHS Trust

20 students who started in Spring 1996 have recently completed R2L.

The Chief Executive, Chris Stevens, has stated "I can confirm that the Trust will sponsor a further intake for the ***'Return to Learn'*** programmes. All the feedback I have received about the current programmes has been very positive and I am sure that we should continue them."

The 1997 programme is underway.

Lambeth Health Care NHS Trust

The Trust has

- an ongoing programme of 'Communication Skills' courses with an annual participation of 50+ members of staff,
- a successful R2L programme. The first groups of students completed in April 1997, and the second phase of courses began in March 1997;
- agreement of *a career and educational guidance day* to follow each course,
- positive encouragement to ex-R2L students to train as Voluntary Education Advisers.

Chief Executive Erville Millar has said "I am delighted to be working in this unique partnership with UNISON which is improving the basic skills of care staff, enabling both them and the Trust to respond to the increasing demands of the NHS."

This initiative has been featured in the TUC film 'Partners for Progress' and highlighted in the conference document 'Partners for Learning'. It has also won a NIACE Adult Learners Award (Learning in the Workplace 1997).

Coventry Health Care NHS Trust

R2L group commenced Autumn 1996. Feedback to UNISON from management and members is positive.

Lewisham Hospital NHS Trust

Ongoing programme of 'Communication Skills'. R2L to begin in Autumn 1997.

Bradford Community Health NHS Trust

One R2L group began in January 1997.

Peterborough Hospitals NHS Trust

R2L group began in April 1997. 'Communication Skills' will begin in September 1997

R2L programmes have begun/will begin in 1997 at:

Lifespan Healthcare Cambridge NHS Trust;
New Possibilities NHS Trust (Essex) (and 'Communication Skills') - begun;
East Suffolk Local Health Services NHS Trust;
Calderstone NHS Trust (Lancashire) - begun;
Grantham and District Hospital NHS Trust;
Lincoln District Health Care NHS Trust;
South Downs NHS Trust:
Northwest Anglia Healthcare NHS Trust;
Thameside Community Healthcare NHS Trust;
West Lindsay NHS Trust;
Walsgrave Hospitals NHS Trust.

Positive discussions are taking place with:

Addenbrooke's NHS Trust;
Ipswich Hospital NHS Trust;
Gloucestershire Royal NHS Trust;
North Staffs Combined Healthcare NHS Trust;
Mid-Sussex NHS Trust;
University Hospital Birmingham NHS Trust;
Birmingham City Hospital;
Bournewood Mental Health NHS Trust;
Royal United Hospital;
Bath NHS Trust;
Oxford Radcliffe Hospitals NHS Trust;
Hinchingbrooke Healthcare NHS Trust;
Mid-Essex Community and Mental Health NHS Trust;
Mid-Essex Hospital Services NHS Trust;
West Suffolk Hospitals NHS Trust;
Green Park H&SS Health Care Trust;
Altnagelvin Hospitals H&SS Trust;
Belfast City Hospital H&SS;
Craigavon Area Hospital Group H&SS Trust;
Mater Infirmorum Hospital H&SS Trust;
Northern Ireland Central Services Agency;
Northern Ireland Eastern H&SS Board;
Royal Group of Hospitals and Dental Hospitals H&SS Trust.

THE EXTENT OF PARTNERSHIP IN LOCAL GOVERNMENT

Staffordshire County Catering R2L group based in Tamworth began in February 1997. Other groups across the County to follow.

Essex County Council Social Services recently started R2L. A corporate county R2L group has also started.

R2L and/or 'Communication Skills' programmes planned to begin in either Spring or Autumn 1997 at:

York City Council;
Oxfordshire City Council;
East Sussex County Council;
Southwark Borough Council;
Hillingdon Borough Council;
Kensington and Chelsea Borough Council;
Lambeth Social Services;
Suffolk County Council; 'Communication Skills' completed.
Birmingham City Council;
East Ayrshire District Council - begun;
Tower Hamlets Learning Support Service;
Sevenoaks District Council.

Positive discussions are taking place with:

Carmarthen County Council;
Norwich City Council;
Leeds City Council;
Wakefield District Council;
Crewe and Nantwich District Council;
Plymouth City Council;
Gloucestershire County Council;
Flintshire County Council;
Wrexham County Borough Council.

THE EXTENT OF PARTNERSHIPS IN HIGHER EDUCATION

The following Universities are offering/about to offer R2L courses for their own staff:

- University of Brighton - October 1996.
- University of Leeds - December 1996.
- Oxford Brookes University - March 1997.
- University of Hull - Autumn 1997.

Case Study 3

Bristol University and the Learning Partnership West

The following case study is reproduced with the kind permission of its authors - Lyn Barham (NICEC Associate), Bill Davies (Learning Partnership West), and Keith Yarwood (Vice-Chair of MSF at the University of Bristol). The case study was written for publication in *Careers Guidance Today* (Autumn 1997), and describes a small-scale but important initiative involving three TU Branches at the University of Bristol working in close liaison with Learning Partnership West to provide careers guidance to members faced with redundancy from September 1997. The TUs involved are the MSF, AUT and UNISON.

Guidance through the Branches

The concern that trade unions have for their members is paralleled by the concern that guidance workers have for their clients. Sometimes these members/clients are the same people. Keith Yarwood of the MSF Union at Bristol University talks with Bill Davies of Learning Partnership West, and Lyn Barham, who introduced them to each other.

Lyn
As we have learnt to adjust to new employment patterns, with all the cost to individuals' job security, I have often thought that the guidance community ought to have more communication with trade unions. If the key to survival for individuals is 'employability', as I believe, then shouldn't we work alongside trade unions to help them convey these messages to their members, and find ways of working with their members in 'learning for life'?

Well, as so often with bright ideas, I never had the opportunity to test this one out of practice, until a chance conversation with Keith, on the day that he received news of redundancies amongst his members.

Keith
Reductions in funding in higher education have led to a range of measures to reduce costs and in the last few months these have included the threat of involuntary redundancies. Coupled with the need to reduce costs is the change in production processes in film and television, and in the Department of Drama, where I work, a restructuring process is being put into place. This means the loss of five posts, two being those of technicians with very long service, and members of my union. In the Department of Geology another two of our members are threatened with redundancy. Our agreement with the University requires that every effort is made to redeploy staff to other posts within the University, but even so the individual members were in my view in urgent need of help with writing CVs, and regaining their self confidence.

Lyn
This was familiar territory for me. It was clear to me that they needed individually tailored support from a properly qualified careers adviser. Keith and I spent some time

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discussing how career guidance could help his members. Keith could see the point I was making, but he had reservations.

Keith
I remembered attending a one-day talk on planning for retirement which had been provided by one of the bigger accountancy consultants. This had focused almost exclusively on franchising possibilities of which the trainer had considerable experience. It did not address the needs of those attending in a balanced way. I could see that our members would benefit from the kind of help Lyn was describing, but it needed to be a lot better than my last experience.

Lyn
Faced with those views from Keith, it was important to introduce him to careers advisors with proper professional skills.

Bill
Lyn put Keith in touch with me to discuss what Learning Partnership West could offer to his members. At our first meeting, Keith was clearly very concerned to find as much support as possible to help them through the difficult process of redundancy.

I briefed Keith about our services, and gave him information to take to a meeting with the University personnel department.

Keith
My members were having their initial interviews with Personnel within two days. The MSF Union put forward a request for proper advice for our members, and advised the staff from other unions that they might like to make the same request. The offer of financial support for the services of Learning Partnership West was extended to all the threatened workers.

Bill
The next step was to invite the five employees whose posts were being made redundant to a meeting to discuss Learning Partnership West's services.

Keith
I made the appointment with Bill on their behalf. It felt strange, but I knew I had to go with them to Bill's office and make the introductions and sit with them at the beginning of the meeting, until they felt comfortable. Possibly my training in First Aid and how to deal with people in shock was relevant!

Bill
In this informal discussion it was clear that those affected by redundancy were still reeling from the impact. A lot of issues and concerns were aired, as well as more practical discussion of what Learning Partnership West could do to help. Talking with the groups initially felt quite intense. I was aware that they were not only dealing with their own individual crises, but also with a need to test out whether I and Learning Partnership West could be trusted. It was clear that they wanted and needed someone who could provide realistic and down-to-earth assistance but who would also respect their need to keep some control of the process.

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We agreed that the next step was for each individual to come for an initial discussion so that a tailored service of support could be drawn up. The formal process of agreeing the programme and costs with the University personnel department then began. The personnel staff, Kim England and Nicky Wood, were very supportive and quick to agree to the proposed programme.

Keith

From the Union viewpoint, I needed to be sure that our personnel department agreed formally to the service being provided - and paid for. This was formalised by an exchange of letters between the University and Learning Partnership West.

Bill

This enabled me to get the process started quickly. In outline, this comprised:

- Initial guidance and assessment.
- Successful presentation (CV; interview skills; letters; application forms).
- Jobsearch techniques (sources of vacancies; employment options; speculative approaches).
- Education and training.

Keith

This seemed to deal with, in fact wildly exceeded, the expectations I had of professional help. Feedback through my regular conversations with the colleagues involved was extremely positive.

Bill

To date the guidance and assessment has clarified the direction for each individual. I feel it has enabled them to gain not only a sense of focus but also clarity about their strengths and what they have to offer, which has led to the beginnings of increased confidence and motivation.

Nevertheless, having seen them individually on a number of occasions, it is clear that the process of moving on is still a roller-coaster. My hope is that each person feels they are well supported. Certainly I will continue to offer assistance right through to a successful resolution. After-care is an important part of the service.

Lyn

Reflecting on what I set in motion, almost by chance, suggests several points for further consideration

- Both Keith and Bill were able to adapt their workloads to give this real priority. There was a double load of putting in place the funding and the formal relationships in parallel with giving time and attention to the staff affected. They both needed to give time to both aspects, and over a timescale of just a few days.
- Keith will happily admit that he learnt a lot about career guidance in a very short time. Too often redundancy in the workplace becomes an uncomfortable topic between those staying and those going, but Keith saw that he could play a really important role by staying in regular dialogue with his colleagues, and offering informal support alongside the union procedures for which he is

responsible. He also took the trouble to understand what the guidance process was about, and informally supported it alongside Bill's more formal output.

But it all happened almost by chance. Keith was not aware of career guidance through his union connections. He might have identified the general need, but would have had no idea whom to use. The message about professional career guidance is not yet public currency. It seems to me that there is a good argument to have unions much more actively represented on TEC and Careers Service boards and consultative groups.

In discussion with Bill, as we wrote this article, he talked about Learning Partnership West's priority on networking locally and on building partnerships. They are making progress, but appropriate cross-referrals are not yet secure enough. Messages about individual career management and about career guidance will slowly become better understood by the workforce at large, but as an intermediate step, trade unions and guidance services could be useful allies.

***Keith Yarwood** is Vice-Chair of the MSF Union at Bristol University, and works as Drama Assistant and Production Co-ordinator in the Department of Drama. Within Learning Partnership West, **Bill Davies** works in Career Consultants West, which specialises in commercial services to individuals and organisations. **Lyn Barham** is a freelance trainer and consultant in careers work, an Associate of NICEC, and director of Careers Development Ltd, a specialist training company.*

Key learning points

- *The Case Study demonstrates the value to TU members of their representatives building and having access to extensive local and regional networks, and being prepared to inform themselves about the nature of guidance and the availability of local guidance provision.*

- *It is important that TU representatives are able to identify their members' need for guidance, and as a consequence are prepared to negotiate and initiate appropriate action on behalf of their members with management.*

- *The Case Study provides evidence that scope exists for closer relationships between local Careers Services and TUs to extend guidance facilities to TU members.*

- *In this example the TU representative most closely involved acts in an intermediary guidance role. Activities include:*
  - *identifying the guidance needs of members*
  - *advocacy to management*
  - *positive networking*
  - *initial explanation of guidance provision to members*
  - *providing a continuing source of advice and support to members, including individual help in confronting the trauma of redundancy and willingness to accompany members to initial meetings with the adult careers adviser*

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- *follow-up support, including help in rebuilding the morale of members and encouragement in taking action*
- *preparedness to provide positive feedback to the careers adviser*

- *Guidance for redundancy is essentially guidance for change within a flexible labour market. Arguably the missing factors (also illustrated in this case) are*
  - *ready access by adults to continuing guidance facilities;*
  - *a lifelong learning culture within a sufficient number of workplaces which help to prepare and equip staff for change.*

- *The writers observe that TUs could be more actively represented on TEC and Careers Service boards and consultative groups.*

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Case Study 4

Elida Fabergé, Leeds

1 Elida Fabergé is a Company within the Unilever Group and produces the largest UK-range of household-name toilet requisites (eg Timotei and Organics shampoo, Vaseline, Impulse, Lynx and Brute body sprays, and Sure Deodorant) The Leeds Company employs approximately 750 people

2 The highly productive and continuing partnership between Management and Unions (USDAW and MSF) which has been created within Elida Fabergé owes its origins to Management's adoption in 1987 of a policy of Total Quality. Although the Unions were not initially involved, it soon became clear that Union understanding, agreement and support was essential if Management was successfully to carry through a range of policy initiatives including skills reviews, staff appraisal, training for multi-skills, and action to attain BS5750, and (in 1991) the Investors in People award, as well as project improvements.

3 Particular concerns of the TU representatives included:

- Ensuring employee 'ownership' of learning;
- Extending learning provision to meet the needs of production workers as well as management;
- Providing stepping stones for those with basic learning needs;
- Providing part-time workers, affected by Elida Fabergé's decision to stop part-time employment, with a wider range of employable skills;
- Ensuring employees acquired skills which could help them obtain employment in the event of redundancy.

4 The introduction of a Management-Union team approach enabled the first of a subsequent raft of initiatives to be introduced, which have created their own momentum and led to a constantly reinforcing cycle of continuous improvement. Starting points included:

- A series of training programmes in TQ systems and procedures provided by Ashridge. These were initially organised for Management and Union representatives, and then designed to enable Elida Fabergé to form its own internal TQ training team - which included Union members - to train the rest of the workforce.
- Training in designing and administering employee questionnaires, organised by Templeton College, Oxford, and again equipping Management and Unions to work in partnership on implementation.

5 A particularly significant learning point for all involved has been the realisation that Union representatives are strategically positioned to:

- communicate with employees;
- provide support and encouragement to individuals and groups to take full advantage of the opportunities made available for their own and the Company's benefit;
- help their members understand that their own and the Company's best interests are frequently indivisible;

- provide informed feedback to Management on employee learning requirements.

As a result a clear understanding has developed within Elida Fabergé about the fundamental role which can be played by Union representatives within front-line guidance.

6 One important consequence has been the creation of an 'open Company' culture in which information is openly communicated. Central to the policy of open and equal communication is easy access by employees to information on learning opportunities. Union representatives are seen to have a fundamental guidance role in terms of initial information provision, signposting, encouragement and support, especially at shopfloor level. Employee lack of confidence in learning ability was perceived very early to constitute a major blockage to take-up.

7 In 1995 the Company organised a two-day training course in front-line guidance skills for shop stewards and other Union representatives, delivered in partnership with Leeds Metropolitan University. Course members were selected on the basis of their potential as future counsellors (ability to listen, interest in people etc) and included representatives of ethnic minorities.

8 Training covered the following areas:

- the duties and skills of a union representative;
- the diversity of support that can be provided to members, and how to distinguish between union and non-union issues;
- the nature of guidance and counselling, and the skills involved;
- listening and feedback - understanding and practice;
- signposting - awareness of where help and support are available;
- helping individuals to help themselves - focusing on non-union related issues.

9 A particular requirement of Union representatives proved to be the ability to help members to take action for themselves, rather than the representative carrying the full responsibility for implementing action on each member's behalf, including referral and advocacy. Previously the function of signposting could also be interpreted as the need to walk alongside the member and carry the main burden during the first stages of each individual journey. *(The difficulties involved in 'letting go', possibly arising from the parental approach which can come naturally to some TU representatives, has been identified as a key Union-representative training issue during a number of discussions with TU representatives and others in the course of preparing these case studies).*

10 Elida Fabergé has successfully developed into a learning Company, with employees increasingly integrated into a learning culture, and the Unions have been heavily involved in helping to carry through the whole process of attitudinal and cultural change needed to bring the policy to its current stage of fruition, and to earn the Company increasing recognition as a national exemplar.

11 Prior to 1987 Elida Fabergé had a good reputation for training, but principally restricted to specific sectors and concentrated on new entrants. Continuing training, and the training department itself, had fallen victim to economies made during the recession. The falseness of this economy is now fully appreciated.

12 However, since 1987 progress has been rapid and impressive. Training and team development is now seen as a key line management responsibility, and internal training is delivered by volunteer staff of all levels (up to Board and including Union members) who make up Elida Fabergé's *Faculty of Trainers*.

13 The Company places an emphasis on the celebration of individual and team achievement. Examples include presentations for achievement, recognition of achievement in the Company newspaper, and the introduction of 'thank you' cards to enable employees to thank each other for individual personal services and kindnesses. The readiness of the whole Company to celebrate achievement is making a powerful contribution in terms of:

- changing attitudes;
- creating a learning culture;
- ensuring that people feel positive about each other and themselves;
- as a direct consequence being pre-disposed to act positively, including investing in training and self-improvement more generally.

14 A pivotal innovation has been the development of the Learning Centre, again with strong partnership support from both Management and Unions (DfEE has also provided strong support for Learning Centre development during 1992-5 through the Gateways to Learning initiative). The Learning Centre is available for 24 hours a day 7 days a week, and provides employees with constant access to information and advice on learning opportunities, and to a wide range of learning material relevant to qualifications and areas of skill and expertise applicable to the Company. This information is summarised and made readily available in a regularly-updated Learning Opportunities Directory. Information is also provided separately on non-vocational learning, and a TAP unit has been installed.

15 The Learning Centre makes extensive use of IT, and is equipped with a CD-ROM, Interactive Video, TV and Video, cameras, 8 networked PCs, 5 stand-alone PCs, and a resources library including books, open-learning materials, audios and videos. The facilities are heavily utilised. An important initial motivator for staff who have not been involved in formal learning since leaving school is often the desire to keep up with their own children, and to be in a position to provide them with assistance. An increased understanding of IT is often the starting point. (*Again the same observation has occurred in discussions elsewhere in preparing these case-studies, and is fully appreciated by the Union representatives.*)

16 A full-time Manager - Hazel Elderkin - is responsible for the Learning Centre, including the provision of advice and guidance. Hazel holds the RSA

Certificate in Educational and Vocational Guidance for Adults and Diploma in Training Management; is a Member of IPD; and has studied successfully through the Company's professional development programme for a Masters Degree in Organisational Development. The University of Leeds' Degrees through Workbased Learning programme also provides tuition on site via video links.

17 As a direct consequence of this initiative, the Company has also created the Elida University in partnership with Leeds Metropolitan University

18 The partnership of Management and Unions has ensured that courses are regularly available at basic skills level, including help with literacy and numeracy. Union feedback from employees revealed basic skills as a priority learning requirement. IT and keyboard skills have proved particularly popular. The attention given to the learning needs of production workers has helped a significant number to progress both within the company and outside.

19 Female employees have proved to be particularly keen to take full advantage of the learning opportunities available. The Unions have noted the improved confidence levels, one consequence of which is that women have shown a greater readiness to participate actively in Union work and to hold office.

20 The Elida University and the attention given to basic skills are two of many benefits for Company and staff which can be seen to flow directly from

- the concern shown by the Elida Fabergé Management-Union partnership for:
  - Total Quality
  - the creation of a company culture of learning;
- the Company's positive approach towards obtaining employee feedback on learning needs, experiences and related issues through regular surveys and research;
- Elida Fabergé's evolution into a learning company;
- the overall Management-Union partnership approach to development.

21 Organisational benefits for both Company and employees include

- total quality philosophy shared by all staff, and permeating the Company,
- organisation of European works councils,
- one of the very first companies to attain IIP (1991),
- change in management styles (ie open, non-hierarchical, teamwork, sharing, importance of optimising everybody's contribution),
- line management responsibility for training,
- shared commitment to skills analysis (for now and for the future) and the practicalities and importance of multi-skilling;
- pay linked to assessed and accredited competence in the job (ie to training);
- change from production line (15/20 staff) to small team (c4 staff) approach - the team members are responsible for their own work (staff

allocation, rotas, production data, targets and outputs, quality, taking action to correct faults and avoid wastage, holiday arrangements, etc)

- childminding service introduced for all staff (male and female) in liaison with Leeds Council, including personal advice on site 2 days per week by a specialist member of Council staff;
- satisfaction surveys carried out with staff at regular intervals, to assess level of satisfaction, and identify requirements - satisfaction questionnaires include questions relating to training and the learning Company
- marked drop in absenteeism and increase in staff retention

22 Learning and guidance benefits for both Company and employees include:

- integration of IIP practices into the whole-Company approach to staff development;
- creation of the Learning Centre, including its information, guidance and hi-tech resources ;
- Learning-Centre open access 24 hours per day 7 days a week;
- 10 days of training per annum for every employee (the vast majority take up this entitlement);
- the introduction and implementation of a comprehensive Jobskills programme (including Company-specific training in manufacturing processes related to related to the engineering lead body - EnTra - standards);
- equal opportunities a reality, not simply verbiage (eg many of the manufacturing workers attaining EnTra standards are female);
- manufacturing, engineering and warehouse employees hold their own Records of Training folders, or Company "records of achievement" - highly regarded within Elida Fabergé as each employee's "personal toolkit" *(also note the Company's observation that NRAs might attain recognition more rapidly if more companies adopted a similar approach towards individual ownership of learning, including issue of Company versions of NRAs, and if NRA marketing was targeted as much on adults and industry as on schools);*
- recognition of the key TU role in guidance, and the provision of the two-day training programme for TU representatives in front-line guidance skills;
- Learning Opportunities Directory listing all Learning Centre resources and opportunities;
- successful development and implementation of the Degrees through Workbased Learning Programme in conjunction with the University of Leeds;
- creation of Elida University to provide staff progression routes up to degree/post-graduate level;
- extension of the resources of the Learning Centre to members of employees' families, including those at school, in direct response to requests for extra learning resources and tuition over and above those provided at school *(note the scope for the Learning Company to gradually extend and influence the development of the wider local learning community).*

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23 The Union representatives are rightly proud of Elida Fabergé's record and the key role they have played in its achievement. Representatives of both USDAW and MSF invite representatives of their respective Unions throughout the Country to see what can be achieved for their members through creative partnership and teamwork. Elida Fabergé is regarded as a benchmark of good practice by USDAW. The week after this case study was researched staff from USDAW HQ were visiting the Company to prepare an extensive case-study for national Union purposes. The Chief Education Officer of USDAW, James Rees, has visited Elida Fabergé; and in October 1997 a visit is scheduled for John Monks (who will also present the Company with its third IIP Award).

24 Elida Fabergé is also acting as a pilot for other members of the Unilever Group, and is supporting the establishment of learning centres in other member companies.

25 Elida Fabergé is a prime example of how it is possible to evolve a learning community given:

- an initial nucleus of believers;
- the motivation to create positive team approaches and partnerships so that the beliefs can be communicated outwards and result in an increasing and constantly reinforcing range of positive actions and initiatives (ie the endless-ripple effect of TQ when it becomes truly integral to the working culture).

26 The full support of both Management and Unions working together is seen as fundamental to Elida Fabergé's success.

Key learning points

- *The Case Study emphasises the fundamental importance of achieving a working partnership between Management and Unions* (as above).

- *TU representatives have a key role in provision of front-line guidance (information, identification of need, networking, signposting, support, feedback), in offering continuing encouragement to learn, and in influencing the culture change through their close day-to-day relationships with members.*

- *The example of Elida Fabergé shows that employee volunteers are also well-positioned to fulfil front-line guidance roles, especially where they are pre-selected on the basis of their counselling potential.*

- *It is important to provide training for TU representatives and employee volunteers in front-line guidance in order to improve skills. training also helps to ensure that the TU role can be understood and consciously recognised by all parties (including the TU representatives themselves).*

- *Immense benefits for Company, individual employees, family and community can result from the successful partnership implementation of well-integrated TQ*

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policies, and the creation of a learning culture which is shared by the whole Company.

- *The Case Study shows the high level of latent demand for learning among many employees, including those with few if any qualifications. Elida Fabergé is a significant example of a Company which has successfully tapped into this potential demand through the implementation of a policy which provides the right level of encouragement, listens to the needs of employees, and provides positive responses in terms of opportunity creation.*

- *Elida Fabergé is also one of several examples of learning companies which have understood the strong motivating effect on employee parents, who wish both to keep up with and contribute to their own children's education.*

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10

Case Study 5

Horizon Biscuits
~~Premier Brands~~, Moreton, Merseyside
in liaison with
North West TUC/TECs Bargaining for Skills Project

North West TUC/TECs Bargaining for Skills Project

1 The *Bargaining for Skills* projects are organised by TUC Regional Councils and TECs through joint funding. There are now 10 *Bargaining for Skills* initiatives covering some 60 TEC areas. Main objectives include:

- promoting joint action between all parties, including TUs and Management, to raise the skill levels of the workforce and to assist in achieving the NTETs;
- increasing understanding throughout industry of the use and value of NVQs, and encouraging involvement in such initiatives as IIP and Modern Apprenticeships;
- identifying and supporting activities generally which contribute to the competitiveness agenda at local and national level.

2 Methods of achieving these objectives employed by the Project Co-ordinator (Dave Eva) and Project Workers in the NW initiative include:

- working closely with TU full-time officers and workplace representatives to enable them to bargain more effectively on vocational training and employee development issues, and to adopt policies which encourage the development of cultures of lifelong learning throughout local companies;
- providing awareness-raising briefings for Management, Unions and workforce;
- providing any support which may be necessary to take forward in-company learning provision and NVQ training;
- developing materials on good practice and partnership action to extend workplace training and employee-development initiatives.

3 Recent figures show that:

- briefings have been provided for 1,440 union officers and representatives during the first 2 years of the project;
- the Project Team has helped to initiate 15 workplace-learning projects in the Region, with a further 9 agreed in principle.

4 The Project Staff are sensitive to the importance of guidance in achieving individual and workforce participation, and their activities include working closely with local guidance providers including Careers Services, ES, National Training Organisations, Education-Business Partnerships, and educational establishments including Schools and Colleges. Community objectives include facilitating work experience, sandwich placements and education-business links more generally.

5 A particular objective is to promote high-quality guidance in the workplace

Premier Brands

6 Premier Brands was part of Cadbury's until the 1980s, and is now owned by Hillsdown Holdings. A workforce of approximately 3,500 is employed on a site with 5 companies - Biscuits, Beverages, Cakes, Chocolate, and Tulip International. Products include Cadbury's biscuits (Fingers and Snack), Smash, Cadbury's cakes, Typhoo Tea, and Thornton's chocolate.

7 The case study relates to Premier Biscuits, which is acting as the pathfinder for learning development, working in close liaison with *NW Bargaining for Skills*.

8 The impetus for the learning initiative has been provided by the TGWU. The TGWU Site Convenor, Richard James, and Deputy Site Convenor, Brenda Sanders, are both full-time, and have an office on site which covers all 5 companies.

9 It is hoped to bring the AEEU and MSF on board shortly, and for the impetus for the creation of a learning community to be extended to the other companies through the example currently being set within Premier Biscuits. It is anticipated that Beverages will shortly begin to introduce an equivalent policy, building on the partnership approach which is proving increasingly successful in extending learning opportunities to employees within Biscuits.

History

10 Premier Brands has experienced a number of changes in recent years, some of these resulting in job loss. Premier Brands is one of many companies where success can lead to redundancy, as profits are used to invest more heavily in hi-tech. The TGWU appreciated that many of the workforce were at risk because they had few if any qualifications, and had left school at the first opportunity. Many of the workforce were women, significant numbers employed part-time.

11 The Union Convenors have developed extensive local networks, and contacted *Bargaining for Skills* to discuss:

- multi-skilling;
- assessment and accreditation, including recognition of skills already developed;
- training for NVQs;
- employee development, the wider availability of learning opportunities, and the gradual creation of a company learning culture;
- the development of a Management-Union partnership approach to take forward the proposed learning initiatives;
- methods of ensuring that all parties understand the inter-relationship between adopting a positive approach towards lifelong learning in the workplace, and policies concerned with ensuring total quality throughout the company and workforce;

- ways of ensuring that employees understand the individual relevance and value of learning, and are encouraged and supported to take advantage of the opportunities created, ie *guidance*.

12 The discussions have resulted in a sequence of actions to begin the process of creating a learning culture throughout Premier Brands, building on the experience currently being developed within Biscuits. These include (in sequential order)

- separate *presentations by NW Bargaining for Skills* to:
  - senior TGWU Convenors and Representatives;
  - all TGWU Representatives across the 5 companies;
  - Senior Management and TGWU Representatives in Premier Biscuits
- *two interview surveys of members to determine views on training*, including any views they might have of current training programmes and training providers (the initial survey was rough and sample only, the second and later survey more detailed and comprehensive of membership);
- a *presentation by the TGWU Convenors to Management*, relating lifelong-learning policy to TQ and related initiatives including IIP;
- joint discussion between *Management and Union* in Premier Biscuits, *supported by NW Bargaining for Skills*, to take forward the upskilling programme. Initially Management was reluctant to establish a Learning Centre, and gave priority to the introduction of NVQs. TU concern was influenced by the experience of previous redundancy, and the difficulties numbers of employees encountered in coping successfully with unemployment because of poor skill levels. The TU focused on the need to establish a company learning culture, and to provide basic skills and other bridging opportunities to employees with no tradition of learning. Eventually a *'twin track' approach was agreed to introduce NVQs and to establish a Learning Centre*;
- *delivery by Bargaining for Skills of a training course for shop stewards* to enable them to understand *workplace assessment and accreditation*, and to obtain *D32 and 33 qualifications* against competences acquired through training in union management skills. Some TU representatives also attended an *A21/22 TNA course* to assist them in providing *front-line guidance on learning to individual and groups of members*;
- organisation of a *pilot basic IT course at Wirral Metropolitan College* (WMC) for workers, leading where required to CLAIT qualifications. The course was organised by *the TGWU in conjunction with the TUC Education Service Unit in WMC*, where *tutors have developed specialist skills and experience in working with TU client groups*;
- formation of a *Steering Group for the Premier Biscuits Training Project*, representing the main partners - Management, Union, Bargaining for Skills, CEWTEC, and WMC.
- introduction on a pilot basis of *NVQ Levels 1 and 2 in food and drink manufacture*, delivered by WMC and funded by CEWTEC;
- establishment of a *Learning Centre on site*, in conjunction with WMC who are providing 6 months' free support.

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13 Specific actions and initiatives are considered in more detail below, and in the attached appendices.

Sample interview survey by members to determine views on training

14 The interview survey is a prime example of a Union taking a cross-Company initiative to:

- identify issues including workforce-learning requirements and barriers to learning;
- feed back the information to Management;
- use the information in partnership with Management to determine a Company-wide learning strategy.

15 The findings of the survey indicated that:

- training was not accessible to all employees;
- many employees considered they had no opportunities for advancement because of a lack of individual development plans;
- the domestic responsibilities of female members represented a major barrier to learning;
- many employees were interested in gaining qualifications not directly related to work, as well as having access to vocational qualifications;
- there was a clear need for basic skills provision (especially numeracy, literacy and IT);
- current training, where available, did not lead to externally recognised qualifications;
- present training arrangements were not seen to offer equality of opportunity (eg to women and production workers);
- members with few if any qualifications were more likely to suffer feelings of job insecurity.

16 The survey provided the Union with important data for negotiation purposes, and played an important part in influencing the Management-Union partnership approach now taking forward learning developments within Premier Biscuits.

Presentation by the TGWU Convenors to Management

17 The presentation is a notable example of a TU taking the initiative in relating Management's desire to implement elements of TQ (including IIP), to the creation of a Company learning strategy. The presentation was strategic to TU-initiated negotiations to upskill the workforce, and to provide the learning opportunities necessary for this objective to become a reality.

18 *Appendix 1* contains further details of the content of the presentation which covers explanations of:

- why training and the availability of NVQs are TU issues;
- why high-quality training is integral to TQM;

- how the Company could implement a training and employee-development strategy, including establishment of a Learning Centre and NVQ training - the 'Quantum Leap';
- summary of the 'four steps' towards world-class quality.

19 The contributions and teamwork established between the Site Convenor and Bargaining for Skills Project Manager have been pivotal, and these have supported throughout by the TUC Education Service at WMC (information, advice, resources etc). The Site Convenor, Richard James, has a long-term commitment to lifelong learning, and his knowledge and experience has been further extended through representing TGWU at European consultation events on the implications of new technology for the workforce, and implementing change in small and medium-size enterprises.

Pilot basic IT course at Wirral Metropolitan College

20 There was a heavy demand for the IT course from both full and part-time staff. The course was organised over four 3-hour sessions by the TUC Education Service on WMC premises in employees' own time.

21 The success of the pilot course:

- provided the evidence needed to enable the Union to negotiate further learning opportunities with Management;
- led directly to the establishment of the Learning Centre, with training in IT a prominent feature.

Learning Centre

22 The Learning Centre was opened earlier in 1997, staffed by WMC. The opportunities to learn IT skills and gain the CLAIT qualification have proved particularly popular. WMC staff have found that staff desire to keep up with, and to help, their children has also proved a strong motivator for learning.

23 The computers provide access to a wide range of programmes to stimulate learning, including community-based programmes (eg on local tourist attractions, one - Chester Cathedral - produced by children at a local school), and programmes to introduce staff to the facilities of the Internet.

24 Currently learning is related to the provision of courses, but drop-in facilities are being developed. WMC intends to involve the Merseyside Open College Federation in accreditation to enable learners to have more flexible access to qualifications, and to obtain credits for learning. Much of the development work has been undertaken by the TUC Education Unit of WMC.

25 There is a strong demand for languages, and French and German are to be offered through finance available via *Bargaining for Skills* and the TUC Education Service.

26 WMC staff have identified the need for guidance, and the provision of one-to-one guidance and increased access to information on local learning opportunities is being actively considered within WMC. Adult Directions is available on all computers.

27 The Learning Centre is only available to employees of Premier Biscuits. The frustration increasingly voiced by employees in the remaining four Companies at being excluded is providing an increasingly powerful force to help take forward negotiations on equivalent agreements across the Site.

28 In 1997 an unsuccessful partnership bid was made to the Government Competitiveness Fund for a Project to develop the Learning Centre to:

- write industry-dedicated IT learning materials;
- open up the centre to links (via the Internet) to local SMEs;
- develop IT-based resource materials to support tuition in key skills.

Within the context of this Report the principal significance of the bid is that it resulted directly from a creative Management-Union-CFE partnership involving WMC, Premier Biscuits, Lever Brothers, TGWU, TUC and USDAW.

NVQ Levels 1 and 2 in Food and Drink Manufacture

29 Assessors were trained in April 1997, and 102 employees commenced the pilot course - delivered by WMC and financed by CEWTEC - in June 1997.

30 Level 1 is planned for completion by December 1997, and Level 2 by June 1998. A second cohort is planned to commence as the first candidates complete Level 1.

31 Inevitably the pilot is helping to identify a wider range of learning and guidance requirements, some made apparent as Union, Management and WMC work together to establish the reasons for drop-out (to date approaching 20%). Requirements identified include:

- a very real need for basic skills and return-to-learn provision for a significant, but as yet unidentified number, of employees with few if any qualifications - poor literacy and numeracy skills would appear to be a main reason for drop-out;
- a corresponding need for a fast-track for employees for whom Level 1 is insufficiently demanding, eg through the introduction of APL;
- the need to train assessors in APL;
- more briefing to ensure employees understand the reasons for multi-skilling, and appreciate why the training content is extending beyond the confines of their current work;
- a consequent knock-on requirement to consider the introduction of work enrichment including rotas and work teams (first experienced in terms of the need to provide the breadth of work-based assessment necessary for assessment and accreditation);
- a need for more readily employee-centred guidance provision, making more extensive use of 'intermediary' front-line workers trained to

provide the necessary support, identification of individual needs, signposting, and informed feedback to the policy makers: the intermediaries would provide front-line support to any professional guidance workers who may be made available through the Learning Centre (eg via WMC)

Bargaining for Skills training course for shop stewards in workplace assessment and accreditation

32 The course was developed and delivered by the TUC Education Service and *NW Bargaining for Skills*. The prime objectives were to:

- familiarise Union Representatives with NVQ assessment and accreditation procedures;
- enable them to provide the necessary degree of informed support to members.

The course also enabled Shop Stewards to gain TDLB Units D32 and D33, against competences relevant to union-management training. A smaller number of representatives also obtained the A21 and A22 Units; and this has been fundamental in helping the TU to appreciate the importance of identifying employee needs (both through day-to-day contact and planned survey), monitoring employee progression (including reasons for drop-out) and obtaining feedback which can be used to pinpoint and take forward individual and group learning requirements (eg via the Steering Group which plays a pivotal role in bringing together the various partners, monitoring developments, and planning and actioning policy).

33 The success of these courses, and of the training provided to train supervisory staff in assessment and verification, has prompted the Steering Group to consider training shop stewards and supervisory staff in the relevant:

- A Units (for training needs analysis),
- C units (for guidance-related skills),
- D36 (APL).

These units are also increasingly necessary to meet needs already identified during the NVQ pilot (see paragraph 30).

34 Because of its important pioneering quality and relevance to Case Studies objectives, the course syllabus is included as ***Appendix 2***.

The Premier Biscuits Training Project Steering Group

35 The Project Steering Group kindly invited the consultant as an observer to its meeting on 9 July, to assist in the preparation of the Case Study. The Meeting was chaired by a representative of Management (Operations Manager), and attended by the Site Convenor, Deputy Site Convenor, Shop Stewards representative, Bargaining for Skills Manager, representative of CEWTEC Business Link, and three Lecturers from WMC involved in NVQ delivery and the operation of the Learning Centre.

36 The Steering Group's deliberations went right to the heart of the issues which are frequently involved in piloting and developing in-company NVQ provision and gradually developing a culture of learning, and were sensitively conducted by all concerned. They also offered a privileged insight into the role Union staff and representatives themselves can play in:

- delivering the activities of guidance
- influencing and progressing the whole development of in-company learning cultures.

37 Guidance and guidance-related activities which took place during the meeting included (with examples listed below):

Identification of student need

* *for learning provision in basic skills (literacy, numeracy, IT) both at the NVQ pre-entry stage and to support NVQ candidates;*
* *for more advanced learning opportunities where student/employees' ability level is above Levels 1/2;*
* *for more encouragement and support during the learning process;*
* *for more on-the-job rather than off-the-job assessment.*

Provision of information, advice and support to members

* *on the value of the Learning Centre;*
* *on drop-in facilities;*
* *on the reasons why applicants may not have immediate responses to their written applications for Learning Centre courses (ie not to lose heart because demand is heavy);*
* *on progression opportunities within and outside the Company;*
* *on the personal advantages of staying with the NVQ (even if it doesn't always appear to be relevant), because of the qualification and multi-skilling value, and the subsequent opportunities for progression which may be opened up once the NVQ is attained*
* *by communicating learning information via mass meetings, individual contacts etc, as part of Union representatives' wider functions.*

Feedback

* *on the overall effectiveness and impact of college-delivered training, based on feedback from individual members;*
* *on the difficulties some students were encountering in relating the training to their own vocational areas;*
* *on the need to take greater account of different learning styles;*
* *on the need for the tutors to build in periodic review sessions in which they listen to students' own feedback;*
* *on the satisfaction and value employees are deriving from learning together where they have not previously worked together, and on the foundation this may provide for increased cross-company teamwork;*
* *on the numbers of older employees who are gaining satisfaction from the increasing number of learning opportunities.*

Continued overleaf

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Continued

Advocacy and negotiation on behalf of learners

- *for APL;*
- *for personal development programmes;*
- *for increased access to progression routes for the more able employees and those wishing to extend their range of knowledge and skills;*
- *for further development of drop-in facilities in the Learning Centre;*
- *for a wider range of languages in addition to French and German;*
- *for a small planning group to be formed from current Steering Group members to review current NVQ training programme, and plan provision for the next intake;*
- *on increased funding from CEWTEC for training provision;*
- *for student/trainee representation on both the planning and steering groups (or at least the periodic opportunity for individuals to provide feedback in person);*
- *on the extension of NVQ provision to employees in the trades and management sectors;*
- *on the possible development of teams of volunteer trainers and guidance workers to provide additional support to staff (eg through the presence of volunteers in the Learning Centre);*
- *for flexible training provision which enables employees to identify their own basic skills learning requirements, rather than waiting for these to be identified for them by college tutorial staff and workplace assessors;*
- *for training for Union representatives in front-line guidance skills.*

Additional and future developments

38 The TGWU is interested in involving Union representatives in practical NVQ assessment (as distinct from familiarisation) in order to:

- increase the number of workbased assessors;
- increase the level of hands-on support and informed and experienced front-line guidance provision available to members.

39 Additional help is being extended to part-time workers as a result of a successful TUC Leonardo-funded project. This initiative is designed to train and develop part-time shop stewards to identify the vocational requirements of part-time workers.

40 The Union is considering the implications of introducing individual learning accounts. In the short term one option currently being considered to extend on-site learning facilities is via voluntary contributions by members matched by funding from the Company.

41 The Union is interested in extending the learning opportunities gradually being created within Premier Brands to other local firms, especially the smaller employers, thus extending the workplace-learning ethos on a local multiplier basis.

42 The Union wishes to increase the number of progression routes including training to NVQ3. The effect that multi-skilling can have for the numbers of staff employed is fully realised. However, the Union's first priority is to preserve the economic viability of the Site, for existing and future generations and for the well-being of the local community and economy. The drive

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towards multi-skilling and the creation of a learning community should assist all employees - including those who may face future redundancy - to increase their own ultimate employability.

Key learning points

- *Immense scope exists for well-informed and alert TUs, their officials and representatives to take the lead in extending learning opportunities to their members and creating lifelong-learning cultures within companies which can then gradually permeate the wider local community.*

- *Unions can make a particular contribution towards the provision of learning opportunities for low-skilled workers with little prior educational attainment.*

- *This initiative provides additional evidence that large numbers of low-skilled workers will want to take advantage of the learning opportunities offered if they are given positive encouragement, and are enabled to see that learning is in their own interests. The initial encouragement required can have particular impact if it comes from their own elected Union representatives who they already know and trust, and who are clearly part of their own community and cultural environment;*

- *Union officials who have carefully developed efficient and extensive networks, are well placed to identify sources of assistance and support as and when required.*

- *The achievement of a close working partnership between Management and Unions, based on mutual openness and respect, is of primary importance.*

- *The Case Study demonstrates the advantages of listening carefully to employees and providing feedback data to Management and the policy-makers which has been carefully researched, eg through surveying and sampling the individual views of members.*

- *The TUC/TEC Bargaining for Skills initiative is playing an important catalytic and organisational role in:*
    - *helping to bring together the various partners, and assisting them in identifying how their own agendas can contribute towards the development of an effective team approach in building a company learning culture;*
    - *facilitating the development of positive approaches to workbased learning initiatives and providing continuing support more generally;*
    - *increasing recognition of the fundamental contribution which can be made by the intermediary workers - including Union representatives - in providing front-line guidance services.*

- *It is necessary to take full account of the needs of groups who may have particular learning needs, eg female process workers, part-time workers, workers who lack basic skills.*

- *TU representatives can play a key role in providing front-line guidance (information, identification of need, networking, signposting, support, feedback)*

and in influencing the culture change through their close day-to-day relationships with members.

- *TU representatives benefit from training in front-line guidance which improves skills, and ensures that the TU role can be understood and consciously recognised by all parties (including the TU representatives themselves).*

- *The TU contribution to guidance and lifelong learning can be further increased by providing training for Union representatives in assessment and accreditation procedures.*

- *The Case Study shows the advantages of having access to an FE College which has a positive approach towards outreach (in this instance towards Management, Unions, employees and their families, and the local community more generally).*

- *The TUC Education Unit of WMC has played an important role throughout the initiative, and is helping to ensure the credibility of CFE-delivered training with local Union branches.*

- *The TU's interest in training teams of volunteer trainers and guidance workers selected from the workforce to provide additional support to employees, could have considerable significance in terms of the future development of guidance delivered through intermediaries.*

APPENDIX 1

PRESENTATION BY THE UNION CONVENORS TO MANAGEMENT

DOCUMENTATION

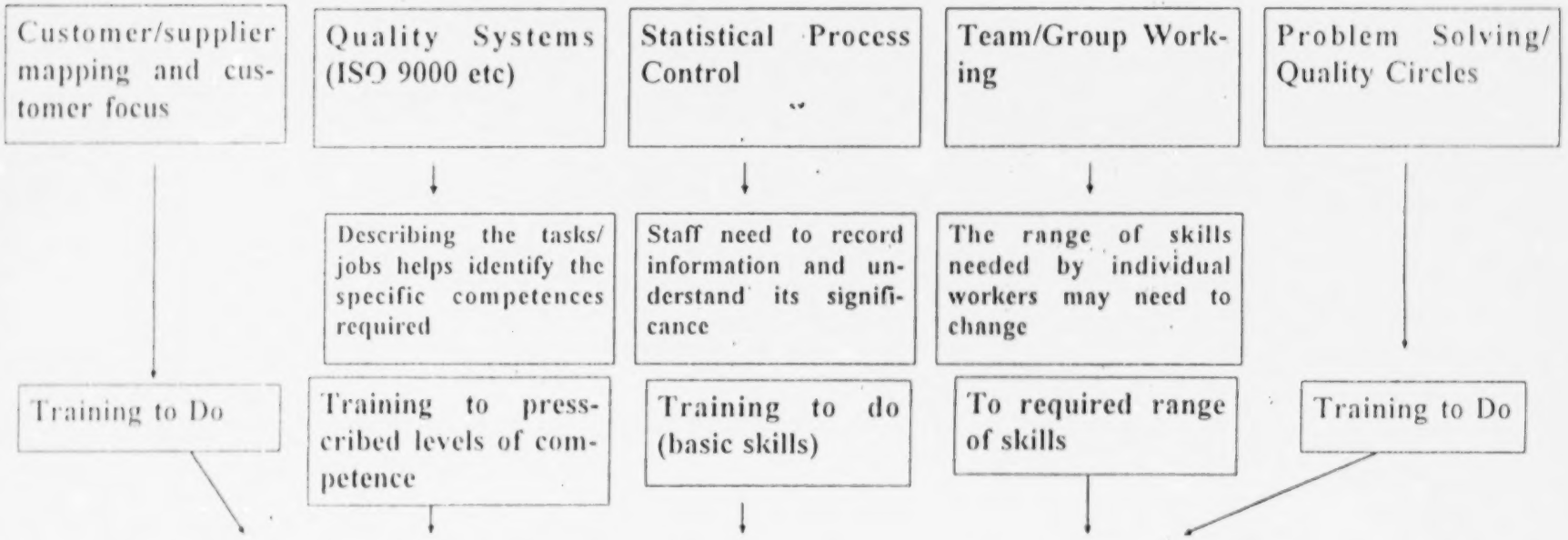
Training as a Trade Union Issue

- Company efficiency/competitivity
- Joint Action/Social Partnership
- Protecting members interests
  - *access to employment*
  - *promotion/career development*
  - *recognition for skills*
  - *security in the face of change*
  - *equity/fairness*
- Maintaining standards of Public Investment

NVQs: Issues for Unions

- what are the relevant NVQs ?
- who does the assessing: *is it seen to be neutral/fair?*
- what levels are available: *is it skill gain?*
- are core skills available?
- do all staff have access to something?
- who pays for what?
- what happens when a whole NVQ is not available: *what if no NVQ* ?

Implications of TQM and other "New Management Techniques" for Vocational Training


Customer/supplier mapping and customer focus
Quality Systems (ISO 9000 etc)
Statistical Process Control
Team/Group Working
Problem Solving/ Quality Circles
Describing the tasks/ jobs helps identify the specific competences required
Staff need to record information and understand its significance
The range of skills needed by individual workers may need to change
Training to Do
Training to prescribed levels of competence
Training to do (basic skills)
To required range of skills
Training to Do
Impact on the vocational training requirements and programm of the organisation
Impact on the vocational training system and standards of the country: for example focus on competence based standards and core competences in the UK

THE QUANTUM LEAP

The Training Initiative

5 key points

- Investment in training and development improves performance.
- There are additional benefits to the organisation if the training is broad-based rather than narrowly employer specific.
- Training and development is valued by employees if it enhances job security, job satisfaction and leads to a quallfication.
- The involvement of the TGWU "adds value" to training and development initiatives.
- Training and development is a crucial part of equal opportunity strategies.

THE QUANTUM LEAP

The Training Initiative

Current Position

* Selection of the NVQ's ? -- Company selected - regardless of relevance to the individual.
* Assessing the training ? -- Company - Trade unions role is unclear.
* Selection of individuals to be trained ? -- Company selected.
* Control of finances and decisions on spending ? -- Company decided.
* How does personal development wishes fit in ? -- It does not - Company needs not individual needs.
* So what is it we are looking for ? -- Not the current training strategy.

THE QUANTUM LEAP

The Training Initiative

What are the principles we wish to have included ?

- Training must be open to all shop floor employees.
- Training must be on a voluntary basis.
- Training must lead to externally recognised qualifications.
- Equal opportunities for training must exist in practice and not just in words.
- Training must be broad-based and not just employer-specific.
- An agreed training policy has to be drawn up.
- An agreed training strategy needs to be explained to all shopfloor employees.

THE QUANTUM LEAP

The Training Initiative

Future

* Establish a Joint Training Board with Terms of Reference.
* Establish a Learning Centre on site that can be used outside working hours by employees.
* Re-examine the training budget.
* Ensure that all sections of the workforce have access to training.
* Ensure that core skills training is provided where needed.
* Clearly demonstrate where training fits in with the overall ambitions of the business.
* Remember that "The road to trust is paved with truth."

The Four Quality Steps

Area	Step 1 Childhood	Step 2 Growing Up	Step 3 Commitment Realisation	Step 4 World Class
Client	Profit placed before customer satisfaction Mere straightforward selling instead of marketing	Client's requirements looked into First steps taken to gauge client satisfaction	Quality Function Deployment (QFD) Client satisfaction - the only quality yardstick	The "Internal Client" - NWAC (Next worksequence the Client) - embraces the entire organisation
Management	Quality - a necessary evil Problem discovery, sorting out	Quality - a costs problem Problem or error eradication	Quality - an economic must Resources earmarked for error-avoidance	Quality - anything but an afterthought Prevention, precautions
Organisation	Functional Quality assurance (QS)	Matrix QA answers for quality	Ad hoc troubleshooter teams Quality responsibility more generalised	Teams and focus factories All employees answer for quality
System System evaluation	QA manuals Procedures No Q cost-area trace	Quality policy QA system set up Q cost area trace	QS system fully set up, audited Hidden Q costs weeded out	Ongoing, systematic upgrading drives Highest possible output, shortest turnarounds (Cycle Time Reduction)

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APPENDIX 2

NORTH-WEST *BARGAINING FOR SKILLS* PROJECT

TRAINING COURSE FOR SHOP STEWARDS IN WORKPLACE ASSESSMENT AND ACCREDITATION

TRAINING FOR CHANGE

COURSE OUTLINE - ASSIGNMENT

Day One
- Introductions
- Review workplace training - A report back from the pre-course activity
- Education and training experience
- Understanding National Vocational Qualifications
- **Workplace Report** - NVQs and members

Day Two
- Report back from workplace report
- The NVQ system
- Jargon
- Competence based training
- **Workplace Report** - members and competence based training

Day Three
- Report back from workplace report
- Barriers to education and training
- Identifying bargaining issues
- **Workplace Report** - Assessment and members

Day Four
- Report back from workplace report
- The role of the assessor
- Supporting the candidate
- Types of assessment

Day Five
- Assessment records
- Assessment
- Problems with assessment
- What is "differing evidence"
- **Workplace report** - Evidence

Day Six
- Report back from workplace report
- Evidence
- Questioning as a form of evidence
- Assessment and feedback
- Assessment plan
- Trade Union involvement in the NVQ process

The remainder of the course concentrates on achieving Units D32/D33.

Day Seven
- Understanding D32
- Understanding D33
- Supplementary evidence questionnaire D32
- Supplementary evidence questionnaire D33

Day Eight - Draw up assessment plan and identify evidence with the tutor

Day Nine - Gathering evidence and assessments

Day Ten - Portfolio building
- Reviewing Trade Union aims
- Course review

Activity

UNDERSTANDING D32

AIMS:

To help you understand the performance criteria for D32

TASK:

The course will be split into four groups, each group will be given an element of D32 and each group will be asked to translate the performance criteria into plain language:

Group 1 - D32.1
Group 2 - D32.2
Group 3 - D32.3
Group 4 - D32.4

REPORT BACK:

Select a spokesperson to report back to the rest of the course

NOTE:

D32 - ASSESSING CANDIDATE PERFORMANCE

D32.1 Agree and review an assessment plan for assessing performance

D32.2 Collect and judge performance evidence against criteria

D32.3 Collect and judge knowledge evidence

D32.4 Make assessment decisions and provide feedback

Activity

UNDERSTANDING D33

AIMS:

To help you understand the performance criteria for D33

TASK:

The course will be split into 3 groups, each group will be given an element of D33 and will be asked to translate the performance criteria into plain language:

Group 1 - D33.1
Group 2 - D33.2
Group 3 - D33.3

REPORT BACK:

Elect a spokesperson to report back to the rest of the course

NOTE:

D33 - ASSESSING CANDIDATES USING DIFFERING SOURCES OF EVIDENCE

D33.1	Agree and review an assessment plan.
D33.2	Judge evidence and provide feedback.
D33.3	Make assessment decisions using differing sources of evidence and provide feedback.

VOCATIONAL ASSESSOR AWARD

IDENTIFY ELEMENTS OF COMPETENCE WITH CANDIDATE(S) AND THE PERFORMANCE CRITERIA TO BE USED ON 3 SEPARATE ASSESSMENT OCCASIONS

↓

PRODUCE 3 ASSESSMENT PLANS FOR ONE OR MORE CANDIDATE(S) AND SEEK YOUR CANDIDATE(S) AGREEMENT

↓

OBSERVE ONE CANDIDATE UNDERTAKING THE ACTIVITIES BOTH OF YOU HAVE IDENTIFIED AND AGREED

↓

YOU GATHER EVIDENCE AND MAKE YOUR ASSESSMENT DECISION

↓

GIVE YOUR CANDIDATE FEEDBACK AND RECORD YOUR DECISION

↓

REPEAT THE PROCESS OF JUDGING EVIDENCE MAKING AND RECORDING A DECISION FOR ANOTHER FIVE ASSESSMENT DECISIONS

Case Study 6

Denmark: Unions in Action: Counselling in the Workplace

Introduction

The Danish Case Study is reproduced from the Eurocounsel Case Study Portfolio, *Examples of Innovative Practice in Labour Market Counselling* edited by Norma Hurley for the European Foundation for the Improvement of Living and Working Conditions.

The Case Study relates to VUS, a state-funded scheme which allows employees, especially those with few if any qualifications, to have access to individually-tailored programmes of adult education and vocational training for between 4 to 36 weeks. Special features include job-rotation and the central role given to counselling in the workplace. The role of Union officials and representatives is seen as pivotal.

It must be emphasised that the Case Study applies to a culture where Management-Union partnerships are a long-standing feature of industrial relations generally, and where there is State-funding of education/training leave for adult employees.

Key learning points

- *The Case Study shows the broad range of Danish TU interests.*
- *A particular feature is the closeness of Management-Union liaison in association with other local/national partners.*
- *TU representatives are actively involved in providing information and guidance in the workplace.*
- *Employees (especially those with basic-skills training needs) have an entitlement to training leave and the opportunity for job-rotation.*
- *There is overall recognition that many employees cannot progress because of inadequate basic skills (especially reading, writing, number and communication).*
- *Training is provided to TU representatives in front-line guidance. There is an emphasis on counselling and negotiation skills, and on planning basic-skills training and job-rotation.*
- *TU representatives are also equipped to help employees with identified basic-skills needs to recognise their own requirements, and to seek assistance.*
- *Unions are involved in planning adult education and training provision, including content and methodology appropriate to individuals and target groups.*

- *The Case Study shows that there can be added value in a the "bottom up" approach to employee involvement - ie they have ownership of the decisions and outcomes.*

- *The key partners realise the importance of learning and job enrichment in increasing employee motivation, including the motivation to participate more actively in the wider community and to influence others (eg to recognise the importance of lifelong learning in helping to cope successfully with the pace of change).*

eurocounsel

Case Study Portfolio

Examples of Innovative Practice in Labour Market Counselling

Edited by
Norma Hurley

The European Foundation for the
Improvement of Living and Working Conditions

1994

DENMARK

Case Study No. 3

UNIONS IN ACTION: COUNSELLING IN THE WORKPLACE

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THE CONTEXT

INTRODUCTION AND INITIAL DESCRIPTION

Danish trade unions play a number of active roles beyond the traditional ones. In Fakse, a small provincial town in the northern part of Storstrøms County, local trade unions have taken a deliberate step to improve, inter alia, the counselling skills of local shop stewards. The underlying aim is to prepare shop stewards to introduce their colleagues to the sometimes neglected possibilities of job-rotation and training leave.

The initiative is funded by the Ministry of Culture (which covers general adult education) on the basis of a joint

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application for VUS (Adult Education Grant) from VUC (the Adult Education Centre), FO (the Joint Association of Employers' Unions) and AOF (the Workers' Voluntary Adult Education) and from all local organisations. The participants, 10 shop stewards from local private companies and public services, all get their full salary while participating in this 2-week activity. One of the interesting points of this initiative is the active involvement of trade unions, and the emphasis on preventative counselling and information in the workplace.

Job-rotation and training

This state-funded scheme, known as VUS, permits employees, especially workers with a poor educational background, to take part in general adult education and vocational training for 4 to 36 weeks. During their education/training leave, their employers receive a weekly subsidy from the State (December 1992: 2550 Dkr per week). If the weekly salary is higher than this amount, the worker will lose the difference. In a number of cases, however, the employers pay the full salary according to local agreements. This is the training part.

The second component, the job-rotation part, is equally important. While participating in the education or training activities, the workers must be replaced with long-term unemployed, who are paid the same wages as the person they are temporarily replacing. The benefits of this system are that the long-term unemployed get genuine work-experience; the initial employee gets training; the employers get better qualified and motivated workers.

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Strengths

One of the strengths of the two weeks was that shop stewards had an opportunity to immerse themselves in the perspectives and challenges of the job-rotation and training scheme, and, perhaps equally important, to discuss their personal attitudes and joint strategies in the workplace.

Weaknesses

One weakness of the pilot VUS activity was that counselling as a method was only briefly touched upon, whereas comparatively more time was devoted to e.g. word-processing training.

ANALYSIS

The special feature of this pilot VUS activity is that it places an emphasis on counselling in relation to general education and vocational training for employees. It is widely recognised that continuing training is necessary in times of rapid technological change. What, perhaps, is not quite as generally accepted is that organisational and societal changes, equally, call for continued general adult education. By involving employed workers and their elected representatives, rather than the unemployed, the stress is put on individuals already in work, i.e. on socially strong individuals. They need an upgrading in relation to their daily working and societal life, but often find it difficult to fit in such activities with the demands of working life. This is where counselling in the workplace is needed.

What needs improvement is not so much the job-rotation and

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training scheme itself, but rather the employers' and shop stewards' counselling skills and methods. This two-week VUS activity highlights the fact that a number of workers, due to reading difficulties, find it virtually impossible to fill out even simple forms or applications. With no further training, people with difficulties of this kind could soon find themselves unemployed as a result of rapid technological developments. In these cases, the competencies of the shop stewards must include basic counselling skills in helping and motivating colleagues to overcome such inabilities.

LESSONS TO BE LEARNED

This particular initiative is a pilot activity. It points to the vital role of local trade unions and shop stewards in the local context. It represents a bottom-up approach which places an emphasis on educational and vocational training measures. In this context preventative counselling plays an important role as a mechanism to inform and encourage people to take part in the job-rotation and training scheme. Other countries might find it inspiring to see how active the ordinary shop stewards are in this process, although they might need further training in more advanced counselling methods. As indicated, the extended roles of shop stewards in Denmark go beyond the traditional roles of trade unions in most countries. Finally, the long-term unemployed benefit from being rotated into real jobs rather than job-surrogates. The employees get an educational break, and the employers benefit from better motivated and well-trained workers. Counselling lubricates this whole process.

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